

Retention and Classification Report

Agency: Department of Human Services. Office of Public Guardian (3238)

195 North 1950 West
Salt Lake City, UT 84116
538-8255

Records Officer Terri Ruesch

27645 Financial information
25889 Guardianship and conservatorship case records

AGENCY: Department of Human Services. Office of Public Guardian

SERIES: 27645

3

TITLE: Financial information

DATES: 1999-

ARRANGEMENT: Chronological by month; thereunder alphabetical by surname

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

This series is made up of payment records for guardian clients, accounts payable, records processed through the state accounting system, and appropriate supporting information which document expenditure of cash. The series is used to refer to clients's past payments and to document payments, invoices, purchasing records, and travel reimbursements. Documents include invoices, check copies, reimbursement forms, etc.

RETENTION:

Retain 7 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 53.

AUTHORIZED: 02/09/2011

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

AGENCY: Department of Human Services. Office of Public Guardian

SERIES: 27645

TITLE: Financial information

(continued)

APPRAISAL:

Administrative Fiscal

This appraisal is based on the administrative and fiscal needs of the agency.

PRIMARY CLASSIFICATION:

Public

AGENCY: Department of Human Services. Office of Public Guardian

SERIES: 25889

3

TITLE: Guardianship and conservatorship case records

DATES: 1999-

ARRANGEMENT: chronological by case closed date, thereunder alphabetical by client surname.

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Guardianship and conservatorship case files are maintained by the agency in support of court ordered guardianship and conservatorship activities. Records are used to track events in the life of the ward, maintain a historical record of the ward, and to assist in determinations and decisions regarding the ward. These records include but are not limited to: name, address, phone number, age, social security number, medical information, psychological information, psychiatric information, property records, financial records, correspondence, and progress and case notes. Records are stored in one case file for both guardianship and conservatorship case records.

RETENTION:

Retain 10 years after case closes.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 11/2005

FORMAT MANAGEMENT:

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Paper: Retain in Office for 2 years after case closure and then transfer to State Records Center. Retain in State Records Center for 8 years and then destroy.

AGENCY: Department of Human Services. Office of Public Guardian

SERIES: 25889

TITLE: Guardianship and conservatorship case records

(continued)

APPRAISAL:

Administrative

PRIMARY CLASSIFICATION:

Private UCA 63G-2-302 (2008)

SECONDARY CLASSIFICATION(S):

Controlled. UCA 63G-2-304 (2008) Medical, psychiatric, and psychological data

Protected. UCA 63G-2-305 (2008) Attorney work product, test questions and answers, records that may jeopardize the life or safety of an individual